

Renewal Information

Name of Qualified Intermediary:

Name Per "First Agreement" (Complete Only if Name is Different than Above):

Please Provide Explanation for the Name Change (e.g. Merger, Reorganization, etc.):

Name Change Information Should be Verified with IRS by Contacting:

Maureen Davis, Associate Technical Advisor
290 Broadway, 12th Floor, New York, NY 10007-1867
Telephone: 212-298-2120
Fax: 212-298-2106
E-mail: Maureen.C.Davis@irs.gov

Renewal Information

Address:

Street: _____

City: _____

Country: _____

Province: _____

Postal Code: _____

QI EIN:

Name of Responsible Party:

Telephone Number:

Fax Number:

E-mail Address:

- For Group Renewal Attach Schedule (Include Renewal Information For Each Affiliate)
- Provide List Of PAI Contracts In Force Including The Name And Address Of The PAI (If Applicable)
- Please Provide A List Of Accounts Holders And Investments (See Next Page For Details)

Renewal Information

Type of Account Holders	Enter Number for Each Type
Foreign Individual Non-Treaty Claimant	
Foreign Individual Treaty Claimant	
Foreign Non-Individual Ben. Owner Non-Treaty Claimant	
Foreign Non-Individual Ben. Owner Treaty Claimant	
Foreign Tax Exempt Entries	
Foreign Intermediaries	
Foreign Flow-Through	
US Individuals, Partnerships, Trusts	
Other US Persons	

Investments in US Assets	Enter Value for Each Type
Foreign Individual Non-Treaty Claimant	
Foreign Individual Treaty Claimant	
Foreign Non-Individual Ben. Owner Non-Treaty Claimant	
Foreign Non-Individual Ben. Owner Treaty Claimant	
Foreign Tax Exempt Entries	
Foreign Intermediaries	
Foreign Flow-Through	
US Individuals, Partnerships, Trusts	
Other US Persons	